



## **The Organic Foods Market in Germany**

March 2000

*(Également disponible en français sous le titre,  
Le marché des aliments biologiques en Allemagne)*

Prepared by the  
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and the  
Canadian Trade Commissioner Service

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**Canada**

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## THE ORGANIC FOODS MARKET IN GERMANY



Team Canada Inc. • Équipe Canada inc

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### EXECUTIVE SUMMARY

Germany is the largest consumer of organic food in the world. In 1998, the market for organic food increased by 10% to nearly \$3.4 billion<sup>1</sup>. Although organic food sales currently represent only 2% of total food sales, they are forecast to account for as much as 10% of grocery sales by 2005.

The growth of organic foods is primarily attributable to consumer demand for healthier, more environmentally friendly foods. As organic foods become more consistently available and gain more exposure (through increased sales in large retail chains), prices will become increasingly comparable to conventional foods and the market will steadily gain a larger market share.

While transportation times, high transportation costs and duties may make some organic foods impossible to ship to the German market (especially fresh products), there are a number of opportunities for Canadian manufacturers, particularly in frozen and consumer-ready organic products.

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<sup>1</sup> All dollar amounts are in Canadian funds unless otherwise stated.

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### MARKET OVERVIEW

With per-capita spending power of nearly \$27,000, German consumers are among the most prosperous in the world. In 1998, consumers spent an average of 17.5% of their disposable incomes on food and beverages. However, these statistics are slightly skewed due to the lower spending power in the East, where 20% to 25% of disposable income is spent on food and beverages. While the quality-price relationship is often a deciding factor for many Germans, consumers have displayed a willingness to spend extra money to purchase higher-quality foods.

Generally, consumers of organic foods tend to be better educated, with above average incomes. In essence, the popularity of organic food is somewhat of a reflection of the wealth of a country's population. Therefore it is not surprising that Germany is the largest consumer of organic foods in Europe and in the world.

While the Germany grocery market as a whole showed minimal growth in 1998, the market for organic food increased by 10%. Annual sales of organic food are estimated to be worth nearly \$3.4 billion. Although this represents only 2% of total grocery sales, experts predict continued strong growth for the near future, with total organic food sales accounting for up to 10% of the total market by 2005.

The growth in popularity is not only visible through rising sales but also in the number of people involved in this sector. The number of organic farmers in Germany has increased tenfold in the past decade and Bio Fach 1999, the organic foods fair held in Nurnberg, had a record 1300 exhibitors this year.

### Key Factors Shaping Market Growth

The key factor driving the growth of organic food sales is growing consumer interest in health. In a recent survey of organic food consumers, 70% cited health concerns as the primary reason for their purchases. As a greater selection of products becomes available and prices begin to decrease, sales of organic products are anticipated to experience strong growth.

A second, closely related, factor that is helping to increase sales of organic foods is the recent food scares in Europe. The Bovine Spongiform Encephalopathy (BSE) scare in Britain is probably the most well-known problem in the European food industry.

However, other recent contaminations include the French government's announcement in August that run-off from waste water and septic tanks from animal processing sites had been discovered in pig and chicken feed and, in June, the Belgian discovery of feed contaminated by dioxins (which are known to cause cancer), which had been consumed by farm animals. These food scares have prompted an increasing number of consumers to seek out naturally produced foods.

Environmental concerns have also played a key role in the popularity of organic foods. When it comes to environmental awareness, German consumers are among the most knowledgeable in the world. Not only is the organic industry more environmentally friendly due to the lack of pesticides, fertilizers and other chemicals, but also nearly all organically produced foods can be found in recyclable packaging.

Consumer confusion has been one barrier to the growth of the organic food market in Germany. With nine producer associations, multiple marketing channels and about 100 different organic trademarks, many consumers have not purchased organic foods simply because they were unaware that a product was organic. However, the recent creation of an industry-wide organic trademark should help consumers identify which products are organic.

Other factors hindering the growth of organic food sales include a lack of refrigeration equipment (especially in smaller retail outlets), a lack of advertising, prices that can range from 20% to 200% higher than similar conventionally produced foods, a lack of availability (both weekly and seasonally), and the need for greater exposure in large retailers.

### **Opportunities**

Bulk goods, such as wheat and pulses, account for the largest share of Canadian organic food exports to Germany. However, as the market for organic foods continues to grow, opportunities for exports of consumer-ready products are also increasing. Canada's reputation as being a clean, environmentally friendly country should also help exporters of organic foods. The largest sectors within the consumer-ready, organic foods market are identified in Table 1.

**Table 1. Organic Food Market by Sector (% share)**

Sector	Percentage
Fresh Produce	25
Bakery/Cereal Products	20
Dairy	20
Meat	15
Other	20
<b>Total</b>	<b>100</b>

Source: Leatherhead Food RA. *The European Organic Foods Markets*, September 1998.

### **Produce**

The German produce market is estimated to be worth \$735 million annually. Vegetables account for just over 50% of produce sales, while fruits account for the remaining sales. However, like many organic markets, produce sales have been hurt by a lack of steady supplies.

Within the vegetable markets, carrots, potatoes and onions account for 78% of sales. Currently, Germany imports only minimal levels of these products, as domestic supply is able to fulfill the demand. Due to the transportation times associated with exporting to Germany, Canadian exporters will only be able to compete in areas where vegetable products have a comparatively long shelf life.

### **Bakery/Cereal Products**

Bread products account for 50% of the bakery/cereal market, which has sales of \$590 million annually. The best opportunities for Canadian manufacturers are pasta, breakfast cereals, and frozen bread/biscuits. However, a large number of German farmers have switched to growing organic wheat recently (which may have a negative impact on Canadian organic wheat exports to Germany). This has given manufacturers a steady supply for organic products, while keeping the price difference between organic and conventional lines low.

### **Dairy Products**

The German dairy market has annual sales of more than \$600 million, and total dairy sales are forecast to double by the end of the year 2001. Although Canadian producers are unlikely to compete in the milk sector due to high transportation and duty costs, they may be able to gain a share of the cheese or yogurt market. In 1998, organic cheese

sales increased by 10% and organic yogurt sales grew by 19%. Strong growth is anticipated in both these sectors for the foreseeable future.

## **Meat**

Recent meat scares such as the BSE crisis in the United Kingdom, the foot and mouth outbreak in the Netherlands, and swine fever in Germany, have contributed to the growing consumer preference for organic meats. The German organic meats market is estimated to be worth \$440 million annually. This represents from 1% to 2% of the total meats market. Although beef is relatively cheap to produce (cattle simply need to be raised on organic grassland), other animals, such as poultry and pork, must be fed organic grains, which significantly raises costs. Organic meats tend to be 30% to 40% more expensive than conventional products, making price the most significant obstacle for the growth of this market.

## ***Actual and Planned Projects***

According to the German Ministry of Agriculture, German organic farmers receive more than \$110 million annually in subsidies. These payments come from the European Union (EU), the German government, and Lander funds. Approximately 55% of these subsidies are spent on supporting existing organic producers, while the remaining 45% is spent on promoting further development of organic farming in Germany.

Although funding for organic farmers in the EU is currently controlled by the governments of member states, the organic food industry is attempting to have this sector included in the Centralized Agricultural Policy (CAP). The industry feels that the current situation restricts available funding for organic farmers, and believes that the inclusion of organic farming under CAP will increase subsidies, thereby helping farmers to bear the costs associated with conversion to organic farming. Market experts forecast that the amount of land used for organic farming will triple within the next five years; if organic farming is included under the CAP, even larger growth may occur.

## **COMPETITIVE ENVIRONMENT**

### **Local Capabilities**

Germany is one of the largest producers of organic food in the world. In 1998, there were an estimated 9200 organic farms, up from 8200 the previous year. Organic farms account for roughly 2.4% of agricultural land in Germany (1.5% of total farms), with a total area of 416 500 hectares. In addition to being primarily self-sufficient, Germany also accounts for one-third of all organic meat and dairy sales within the EU.

An estimated 45 000 people are currently employed in Germany's organic food market. Although the majority of these jobs are in the food processing sector, the retail and farming sectors employ approximately 10 000 workers each. In 1997-1998, the average income for organic farms in Germany was 2% higher than conventional farms with similar products, land area, and environmental conditions. Although labour costs tend to be substantially higher than those incurred by conventional farms, organic farms receive more compensation from government programs and they have lower costs for items such as fertilizers and crop protection.

### **International Competition**

Although the amount of land devoted to organic farming in the EU is still fairly minimal (2% of total land area), there has been a significant growth in the number of organic farms over the last 15 years. In 1985, the EU had only 6300 organic farms. However, subsidies introduced in the 1992 CAP reform package encouraged large numbers of farmers to switch to organic farming methods. By 1998, the EU was estimated to have over 100 000 organic farms, for an average annual growth rate of 26%. Small farms in Mediterranean countries account for the majority of conversions to organic farming, with Italy representing nearly one-third of all organic farms in the EU. Other predominant organic food producers include Austria, Spain, France, Greece, Denmark, Switzerland, Turkey, and Sweden.

### **Canadian Position**

Currently, there are no statistics available on the quantity of Canadian organic food exports, however, the Canadian presence in this market is limited, but growing. The largest organic exports include maple syrup, grains, and seeds (linseeds, sunflower seeds, etc.). Additional opportunities for Canadian exporters include products such as honey, breakfast cereals, pasta, herbs, dried fruits, value-added soya products, blueberries, jams and fruit spreads, meats, and animal feed.

### **Competitive Advantage Through Canadian Government Policies and Initiatives**

#### **Export Development Corporation**

Export Development Corporation (EDC) offers export financing and insurance to Canadian exporters. Additionally, insurance can be provided for larger transactions that are subject to the terms and conditions established by the buyer. EDC prefers to work through letters of credit, bank credits or bank guarantees. Approval for financing will be considered on a case-by-case basis.

## **Canadian Commercial Corporation**

The Canadian Commercial Corporation (CCC) gives Canadian companies access to financing and better payment terms under the Progress Payment Program (PPP). The PPP concept was developed as a partnership between major Canadian financial institutions and CCC. It enables the exporter's bank to open a project line of credit for the exporter's benefit, based on CCC approval of the project and the exporter's ability to perform.

## **Program for Export Market Development**

The Program for Export Market Development (PEMD) is the federal government's primary international business development program. The objective of PEMD is to increase export sales of Canadian goods and services by sharing the costs of activities that companies normally could not or would not undertake alone, thereby reducing risks involved in entering a foreign market. The PEMD refundable contribution is a minimum of \$5,000 and a maximum of \$50,000. Preference is given to companies with annual sales greater than \$250,000 and less than \$10 million, or with less than 100 employees for a firm in the manufacturing sector and 50 in the service industry. Eligible activities, the costs of which are shared on a 50/50 basis, include market visits, trade fairs, incoming buyers, product testing for market certification, legal fees for marketing agreements abroad, transportation costs of offshore company trainees, product demonstration costs, promotional materials, and other costs necessary to execute the market development plan (other components of the program deal with international bid preparation under Capital Project Bidding, and with trade associations when developing international marketing activities for their membership). For more information, visit <http://www.infoexport.gc.ca/pemd-e.asp> or call 1-888-811-1119.

## ***WIN Exports***

Exporters can register their companies with WIN Exports, a database of Canadian exporters and their capabilities. This database is used by trade commissioners around the world and by Team Canada partners in Canada to match Canadian suppliers with foreign business leads and to share information on trade events. For more information, visit <http://www.infoexport.gc.ca/winexports/menu-e.asp> or call 1-888-811-1119.

## ***Agri-Food Industry Market Strategies***

The Agri-food Industry Market Strategies (AIMS) program of the federal government encourages and assists industry associations to develop strategic marketing and promotional plans for target countries. AIMS also co-ordinates the financial assistance needed to carry out the strategies at a national association level. For more information, visit: <http://www.agr.ca/progser/aafaims.html>

## ***Agri-Food Trade 2000***

Agriculture and Agri-food Canada's Agri-Food Trade 2000 program is designed to help the Canadian agri-food industry increase domestic and foreign sales of agriculture, food and beverage products. The program targets agriculture and agri-food producers, processors and exporters who are working collectively through associations, marketing boards or alliances.

## **MARKET LOGISTICS**

On April 1, 1999, Quality Assurance International (QAI), a San Diego-based company, received German accreditation for its organic food verification practices. QAI, which currently certifies more than 500 companies for compliance to the EU's strict organic standards, is the only company in North America that is eligible to certify organic foods before shipment to Germany.

German organic food production is regulated by the Association of Organic Agriculture in Germany (AGOL), which oversees nine organic producer associations. While the four largest associations (Bioland, Biopark, Demeter, and Naturland) represent a diverse selection of products throughout the country, the smaller organizations tend to focus on either specific products or specific areas of Germany. For example, regional associations include Goa (East Germany), Biokreis e.v. (East Bavaria), and Ikosiegel (Northern Germany), while Ecovin represents organic wine producers and ANOG represents manufacturers of cereals, and organic fruits and vegetables.

## **Channels of Distribution**

Germany is not limited to one or two major urban centres from which the distribution network stems, but is marked by multiple business centres through which food products are distributed. In 1998, German food retailers had sales of approximately \$260 billion.

Germany is estimated to have approximately 9600 supermarkets, 2200 hypermarkets and wholesalers, and over 12 200 discounters. Although these retailers account for the majority of total retail food sales, they account for less than 25% of total organic food sales. Sales through the more than 2000 specialty health food outlets and directly from farms account for roughly 65% of total organic food sales. In 1998, the turnover of health food stores increased by 9% to reach a value of approximately \$1.1 billion.

Health food shops currently offer the widest selection of organic foods and, as a result, account for the largest share of sales, although they also tend to be more expensive than supermarkets. In addition, since consumers tend to do the vast majority of their shopping in large food retail outlets, they have to make a separate trip to purchase many of the organic foods that are currently available only in health food outlets.

In recent years, many of the large retail chains have expanded the number of organic foods they sell. Tengelmann (Naturkind label), Rewe (Fullhorn), and Asko/Metro (Grünesland) are the leading supermarket retailers in Germany. These retail outlets are no longer simply adding products that are available through health food stores. Instead, they are developing new and innovative products, especially in the area of organic chilled and frozen meals. As these larger stores add more product lines, analysts expect the prices of organic foods to decrease — which, in turn, should lead to increased sales of organic foods. In the future, large retail outlets are also expected to garner a growing share of the organic food market as consumers are able to purchase a wider selection of products for comparatively inexpensive prices.

### ***Distributors and Wholesalers***

Engaging German wholesalers and distributors is an excellent way to introduce a product to the German market. Distributors also are legally bound to ensure that all imported products adhere to the German/EU food regulations. Concerns about genetically modified organisms (GMOs) and strict regulations concerning the production/sale of organic foods make the use of a distributor or wholesaler a necessary step in accessing the German market. To ensure national distribution, it may be necessary to use more than one distributor or agent.

When seeking the services of a distributor or wholesaler, exporters should also consider the relationship that these individuals have with local governments, buyers and banks; the condition of their facilities; and their willingness and ability to keep inventory. Canadian producers are advised to review the provisions of German/EU law with a qualified lawyer before entering into an agreement with a prospective partner.

### ***Agents and Sales Representatives***

Agents are excellent channels through whom to introduce new products into the German market. While agents solicit business and enter into agreements on behalf of the exporter they are representing, they do not take ownership over the products they sell.

An exporter must weigh a number of factors when selecting an agent, including:

- region(s) covered by the agent;
- reputation;
- product knowledge;
- experience in handling the exported product;
- commission to be paid;
- what (if any) after-sales service is provided;
- track record; and
- size and quality of the agent's staff.

These attributes can best be assessed during a visit to Germany. Manufacturers should also ensure that responsibilities are clearly defined before entering into a long-term relationship.

## **Market-entry Considerations**

### ***Suggested Business Practices***

Although some aspects of doing business in Germany are similar to those in Canada and the United States, certain cultural behaviours and nuances, though seemingly trivial, can be very important.

Germans have a reputation for being punctual. All aspects of conducting business, from arriving on time for meetings to carrying out all details of a contract, are considered to be of utmost importance. Personal relationships tend to be conducted separately from business relationships, and Canadian exporters may need years of contact with German associates before more personal relationships develop.

Commitment is the key to success in Germany. German business people appreciate foreign exporters who are willing to make a long-term commitment to the German market, and are wary of those who only appear to be interested in short-term gains. New products that are introduced in Germany generally require 12 to 18 months before success can be accurately assessed. Only by making a long-term commitment — which includes providing good after-sales support — will Canadian producers be able to overcome their geographical disadvantage to other EU competitors.

### ***Import Regulations***

As a member of the European Union, Germany follows the Community Integrated Tariff (TARIC) system, which applies duties to all imports from non-EU countries. EU/German import regulations, duties and tariff-rate-quotas serve to limit the range of foreign products entering the market, thereby protecting domestic industries. These factors, combined with transportation costs and other import costs, mean that Canadian products tend to be higher-priced than those produced domestically. However, even domestically produced organic foods command a higher price than similar non-organic products.

### ***Local Standards, Certificates or Registrations***

The production, inspection, and labelling of organic agricultural products is regulated by EC Regulation 2092/91. This regulation applies to both processed and unprocessed products of plant origin. Labelling of these foods falls into one of three categories: foods with more than 95% organic ingredients; foods with more than 70% organic make-up

but less than 95%; and foods with less than 70% organic ingredients. Legislation governing products of animal origin (i.e. meats, eggs, other dairy products) is anticipated to be enacted shortly. The use of GMOs is strictly prohibited by EU regulations.

EC Regulation 2092/91 also makes each country responsible for implementing this legislation. AGOL is the control body in Germany, but there are also nine smaller organizations that enforce organic standards. Bioland, Biopark, Demeter and Naturland are the four largest of these organizations.

A standard set of shipping documents must accompany all products exported to Germany. Additional documents may expedite the processing of goods at the German border, but due to the complexity of German/EU regulations, Canadian exporters should request any additional information from the importer prior to shipping. It is recommended that Canadian exporters use the services of a German customs broker, agent or distributor to ensure that all essential documentation is correctly prepared and arrives with the shipment. All documents should be completed in both German and English to avoid unnecessary delays.

#### *Commercial Invoice*

The commercial invoice serves as a bill to the buyer from the exporter, and must accompany every shipment to Germany. Invoices should be thoroughly checked, since any error or omission can result in delays, fines or even confiscation. Invoices must include the following information:

- place and date of issue;
- names and addresses of importer and exporter;
- detailed description of the merchandise, including identifying marks, quantities (in units customary to international trade), numbers and varieties;
- method of shipment;
- name, title and signature of responsible officer;
- all insurance and freight charges; and
- shipper's invoice number and customer's order number.

Exporters should consult with their customs broker to determine how many copies of the commercial invoice should be sent with each shipment, since the number required varies according to the product being shipped. Any promotional information should also be included with the commercial invoice.

### *Export Declaration Form (Form B-13)*

Exporters whose shipments have a value of \$2,000 or greater must complete an Export Declaration Form. Although exporters are technically responsible, agents, brokers or carriers typically complete the form and submit it on behalf of the exporter.

### *Packing List*

A packing list is necessary when multiple packages are shipped, unless the commercial invoice provides the required information. This list should include:

- the number of packages within one case;
- the net, gross and legal weights of each case, and of the total shipment;  
and
- the volume of individual packages, as well as of the shipment as a whole.

Between four and seven copies of the packing list should be included in any shipment, depending on the product being shipped.

### *Bill of Lading*

The bill of lading is the contract of carriage between a shipper and a shipping company. Full contract details are commonly printed on the back of a bill of lading. Various types of this form are used depending on the method of shipping. Each shipment may contain a set of bills of lading, one copy of which should be kept on file, while other copies are sent to the importer and customs broker, respectively. The bill of lading should include:

- description of the product(s);
- weights and measurements of the packages and their types;
- ports of origin and destination;
- names and addresses of shipper, importer and customs broker;
- any freight or other charges incurred;
- number of bills of lading in the full set; and
- carrier's acknowledgment of receipt "on board" of the goods for shipment.

Depending on the product, it may be necessary for exporters to include storage temperature and requirements on the bill(s) of lading.

### *Certificate of Origin*

A certificate of origin verifies that the goods originate in Canada, and are therefore subject to all duties or taxes that apply to Canadian products.

### *Packaging and Labelling*

It is recommended that Canadian exporters examine both German and EU regulations regarding packaging and labelling standards. All imported organic food labels must include:

- the name of the product;
- a description of the product;
- the expiry date and any storage requirement;
- the product's country of origin;
- the alcohol content, by volume (when applicable);
- the manufacturers lot or batch number;
- all nutritional information;
- a list of ingredients and weights in metric units; and
- a list of additives, preservatives, or colouring used.

In January 1993, Germany introduced new packaging legislation, requiring packaging to display the Green Dot recycling symbol. The Duales System Deutschland (DSD) issues licences to German producers to use the Green Dot symbol. Although this symbol is not required by law, it is nearly impossible to sell food products of any kind without it.

Technical restrictions concerning weight, volume and labelling are also applied.

Canadian exporters should, therefore, deal closely with German importers who are responsible for obtaining a licence and paying the associated costs. Licensing fees vary, depending on the type and quantity of packaging materials used.

German consumers are very knowledgeable about what products are or are not environmentally friendly and quite often, products packaged in non-recyclable materials do not succeed in the German market. For example, in 1999, Danone stopped selling its Jahreszeit yogurt in biodegradable containers because there was no recycling program for these materials and therefore, the product was not selling as well as expected. The company expects that sales will improve with the use of recyclable packaging.

After years of deliberation among consumer groups, the Central Marketing Association (CMA) and AGOL, a common symbol has been developed for organic foods being sold in the German market. The symbol is a modified version of a seal that had already been used in the state of Saxony. The symbol shows the words *Oko* (Eco) in red and *Prufzeichun* (test mark) in green, which indicate that the foods have been grown without the use of chemicals and that they were not grown from genetically altered seeds. The establishment of this symbol is expected to raise consumer awareness about organic products and, in turn, lead to increased sales of organic foods. However, the use of this label is considered somewhat expensive, as producers must pay 0.8% of their turnover and an additional 0.1% for the certification of their product.

For further information regarding export promotion, labelling, packaging, agents and distributors, please contact:

Mr. Stephan Rung  
Commercial Officer  
Consulate of Canada  
Prinz-Georg-Str. 126  
40479 Düsseldorf, Germany  
Tel.: (49-211) 172-1718  
Fax: (49-211) 359-165

The Duales System Deutschland GmbH can be contacted directly at:

Duales System Deutschland  
Frankfurter Strasse 720-726  
51170 Cologne, Germany  
Tel.: (49-2203) 937-260 or 937-261  
Fax: (49-2203) 937-191

### ***Authentication of Documents***

Documents that need to be authenticated, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on their behalf, must first be notarized in Canada. Exporters can have the notarized documents authenticated, at no cost, by sending them to:

Department of Foreign Affairs and International Trade  
Authentication and Service of Documents (JLAC)  
125 Sussex Dr.  
Ottawa, ON K1A 0G2  
Tel.: (613) 992-6602  
Fax: (613) 992-2467

### ***Export Credit Risks, Restrictions on Letters of Credit or Currency Controls***

Germany currently implements no restrictions on letters of credit or currency controls.

Generally, the method of payment is a matter for negotiation between the individual supplier and importer. Usual practice is for payment to be made by terms of a letter of credit for 30 to 60 days. In cases where distribution arrangements are concluded, exporters are advised to prepare a contract detailing all major points of agreement, rights and responsibilities.

**PROMOTIONAL EVENTS**

<b>Event/Description</b>	<b>Organizer</b>
<b>Bio Fach 2000</b> February 17-20, 2000 Nuremburg Fairgrounds Nuremburg, Germany  Organic Foods Trade Fair.	<b>Oekowelt Veranstaltungs-GmbH</b> Industriestrasse 12 D-91186 Büchenbach, Germany Tel.: (49-9171) 96-100 Fax: (49-9171) 4016 E-mail: <a href="mailto:info@biofach.de">info@biofach.de</a> Internet: <a href="http://www.biofach.de">http://www.biofach.de</a>
<b>Anuga</b> October 13-18, 2001 (Biennial) Cologne, Germany  Food & Beverage show.	<b>KölnMesse</b> Messeplatz 1, D-50679 Cologne Tel.: (49) 221 8210 Fax: (49) 221 821 2574 <a href="http://www.koelnmesse.de/anuga">http://www.koelnmesse.de/anuga</a>
<b>Intercool</b> September 24-27, 2000 (Biennial) Düsseldorf Fairgrounds Düsseldorf, Germany  Frozen Foods.	<b>Messe Düsseldorf GmbH</b> Stockumer Kirchstrasse 61 40474 Düsseldorf, Germany Tel.: (49) 211 456-001 Fax: (49) 211 4560-668 E-mail: <a href="mailto:info@messe-duesseldorf.de">info@messe-duesseldorf.de</a> Internet: <a href="http://www.messe-duesseldorf.de">http://www.messe-duesseldorf.de</a>
<b>ISM 2000</b> January 30 - February 3, 2000 Cologne, Germany  Biscuits and Confectionery Show.	<b>KölnMesse</b> Messeplatz 1 D-50679 Cologne, Germany Tel.: (49) 221 8210 Fax: (49) 221 8212 574 Internet: <a href="http://www.koelnmesse.de/index.html">http://www.koelnmesse.de/index.html</a>
<b>Prowein</b> March 19-21, 2000 (Annual) Düsseldorf Fairgrounds Düsseldorf, Germany  Wines and Spirits.	<b>Messe Düsseldorf GmbH</b> Stockumer Kirchstrasse 61, 40474 Düsseldorf, Germany Tel.: (49) 211 456-001 Fax: (49) 211 4560-668 E-mail: <a href="mailto:info@messe-duesseldorf.de">info@messe-duesseldorf.de</a> Internet: <a href="http://www.messe-duesseldorf.de">http://www.messe-duesseldorf.de</a>

## KEY CONTACTS AND SUPPORT SERVICES

### Canadian Contacts

#### Canadian Embassy in Berlin

Friedrichstrasse 95, 23rd Floor  
10117 Berlin, Germany  
Tel.: (49-30) 203-120  
Fax: (49-30) 203-12590  
E-mail: brln@dfait-maeci.gc.ca  
Internet: <http://www.kanada-info.de>

#### Canadian Consulate in Hamburg

ABC-Strasse 45  
20354 Hamburg, Germany  
Tel.: (49-40) 35556-295  
Fax: (49-40) 35556-294  
E-mail: hmburg@micro.x400.gc.ca

#### Canadian Consulate in Düsseldorf

Prinz-Georg Strasse 126  
D-40479 Düsseldorf, Germany  
Tel.: (49-211) 172-170  
Fax: (49-211) 359-165  
E-mail: ddorf.td@dfait-maeci.gc.ca

#### Canadian Consulate in Munich

Tal 29  
80331 Munich, Germany  
Tel.: (49-89) 2199-570  
Fax: (49-89) 21995-757  
E-mail: munic.td@dfait-maeci.gc.ca

#### Department of Foreign Affairs and International Trade (DFAIT)

125 Sussex Dr.  
Ottawa, ON, K1A 0G2

#### Central Europe Division (REC)

Tel.: (613) 996-2858  
Fax: (613) 995-8756

#### Market Support Division (TCM)

Tel.: (613) 995-1773  
Fax: (613) 943-1103

#### Department of Foreign Affairs and International Trade (DFAIT)

125 Sussex Dr.  
Tariffs and Market Access Division (EAT)  
Tel.: (613) 992-2177  
Fax: (613) 992-6002 or 944-4840

#### Agriculture and Agri-Food Canada (AAFC)

International Markets Bureau  
930 Carling Ave., 10th Floor  
Ottawa, ON K1A 0C5  
Contact: Nathalie Vanasse  
Tel.: (613) 759-7726  
Fax: (613) 759-7506  
E-mail: vanassen@em.agr.ca

#### Export Development Corporation (EDC)

151 O'Connor St.  
Ottawa, ON K1A 1K3  
Tel.: (613) 598-2500  
Fax: (613) 237-2690  
E-mail: export@edc4.edc.ca  
Internet: <http://www.edc.ca>

#### Canadian Commercial Corporation (CCC)

Metropolitan Centre  
50 O'Connor St., Suite 1100  
Ottawa, ON K1A 0S6  
Tel.: 1-800-748-8191 or (613) 996-0034  
Fax: (613) 995-2121  
E-mail: info@ccc.ca  
Internet: <http://www.ccc.ca>

#### Canadian Food Inspection Agency

59 Camelot Dr.  
Nepean, ON K1A 0Y9  
Tel.: (613) 225-2342  
Fax: (613) 228-6653  
E-mail: cfiamaster@em.agr.ca

**German Offices in Canada****Embassy of the Federal Republic of Germany**

1 Waverly St.  
Ottawa, ON, K2P 0T8  
Tel.: (613) 232-1101  
Fax: (613) 594-9330  
E-mail: 100566.2620@compuserve.com  
Internet: <http://www.germanembassyottawa.org>

**Consulate General of the Federal Republic of Germany**

77 Admiral Rd.  
Toronto, ON, M5R 2L4  
Tel.: (416) 925-2813  
Fax: (416) 925-2818  
E-mail: 106167.430@compuserve.com

**Consulate General of the Federal Republic of Germany**

Marathon Building, 43 Floor  
1250 René Levesque West  
Montreal, QC H3B 4W8  
Tel.: (514) 931-2277  
Fax: (514) 931-7239  
E-mail: 106167.425@compuserve.com

**Consulate General of the Federal Republic of Germany**

World Trade Centre, Suite 704  
999 Canada Place  
Vancouver, BC V6C 3E1  
Tel.: (604) 684-8377  
Fax: (604) 684-8334  
E-mail: 106167.431@compuserve.com

**International Trade Centres**

For export counselling or publications for Canadian exporters, please contact your local International Trade Centre by calling 1-888-811-1119.

**Chambers of Commerce of Germany****Darmstadt - Chamber of Industry and Commerce**

Rheinstr. 89  
D-64295 Darmstadt, Germany  
Contact: Helmut Schoenleber  
Tel.: (49-6151) 871-266  
Fax: (49-6151) 871-281

**Kiel Chamber of Commerce and Industry**

Lorentzendam 24  
24103 Kiel, Germany  
Tel.: (49-431) 51-940  
Fax: (49-431) 5194-234

**DIHT - Deutsche Industrie und Handelstag**

Adenauerallee 148  
53113 Bonn, Postfach 1446, 53004 Bonn  
Tel.: (49-0228) 1040  
Fax: (49-0228) 104-158

**Hannover - Industrie und Handelskammer**

Hannover  
Hildesheim Postfach 30 29 30030 Hannover  
Contact: Werner Jathe  
Tel.: (49-0511) 3107-0  
Fax: (49-0511) 3107-333

## Industry Associations

### **International Federation of Organic Agriculture Movements (IFOAM)**

c/o Ökozentrum Imsbach  
D-66636 Tholey-Therley, Germany  
Tel.: (49-6853) 5190  
Fax: (49-6853) 30110  
E-mail: IFOAM@t-online.de  
Internet: <http://www.ecoweb.dk/ifoam>

### **German Association for Natural Foods and Products (BNN)**

(Bundesverbände Naturkost Naturwaren)  
Robert-Bosch-Str. 6  
50354 Hürth, Germany  
Tel.: (49-2233) 9633-844  
Fax: (49-2233) 9633-840  
E-mail: BNN-Grosshandel@t-online.de  
Internet: [http://www.n-bnn.de/willk\\_en.htm](http://www.n-bnn.de/willk_en.htm)

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## **OTHER REFERENCE MATERIAL**

### **Internet Sites**

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Association of the German Trade Fair Industry: <http://www.auma.de>

Association of Organic Farming Organizations in Germany (AGÖL): [http://www.agoel.de/info\\_e.html](http://www.agoel.de/info_e.html)

Bio Fach: <http://www.biofach.de>

BNN - German Association for Natural Foods and Products: [http://www.n-bnn.de/willk\\_en.htm](http://www.n-bnn.de/willk_en.htm)

Business in Germany: <http://www.business-in-germany.de/Engl/index1.htm>

Chambers of Commerce of Germany: <http://www.uitc.com/chambers/europe/germany.htm>

Canadian Food Inspection Agency: <http://www.cfia-acia.agr.ca>

Department of Foreign Affairs and International Trade: <http://www.dfait.maeci.gc.ca>

EU Council Regulation No. 2092/91: <http://europa.eu.int/comm/sg/consolid/en/391r2092/artm.htm>

European Network for Scientific Research Coordination in Organic Farming:  
<http://www.cid.csic.es/enof/index.html>

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ExportSource: <http://exportsource.gc.ca>

Federal Statistical Office of Germany: <http://www.statistik-bund.de>

Federal Ministry of Food, Agriculture and Forestry: <http://www.bml.de>

German Embassy and German Information Centre: <http://www.germany-info.org>

German Embassy in Ottawa: <http://www.germanembassyottawa.org>

German Government: <http://www.bundesregierung.de/english/01/newsf.html>

Governments on the WWW: Germany: <http://www.gksoft.com/govt/en/de.html>

InfoExport: <http://www.infoexport.gc.ca>

Information Network for Organic Produce: <http://www.sources.de/infop/home.htm>

Institute of Organic Agriculture: <http://www.uni-bonn.de/iol/english.htm>

International Federation of Organic Agriculture Movements: <http://www.ecoweb.dk/ifoam>

Organic Crop Improvement Association: <http://www.ocia.org>

Strategis: <http://strategis.ic.gc.ca>

Tradeport: <http://www.tradeport.org>

Trade Show Central: <http://www.tscentral.com>